

# USER GUIDE



## Emailed and Scheduled Reports **USER GUIDE**

**FRED**

Contact Fred IT Group

Head Office — 03 9418 1800  
Website — [www.fred.com.au](http://www.fred.com.au)  
Fred Help Centre — <https://help.fred.com.au>

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# INTRODUCTION

In Fred Office, you can schedule reports to be automatically run whenever you need them.

When reports are run, they can be shared between Fred Office users with particular security roles, and can also be sent to any email address (for example, to your accountant).

## CONFIGURE FRED OFFICE FOR EMAILING REPORTS

### Prerequisite

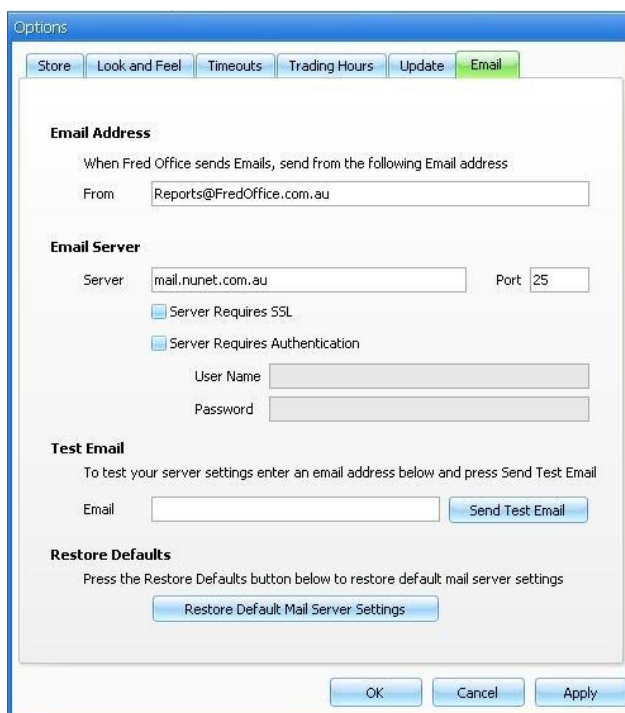
To enable Fred Office to send emails, you need to know your email account details.

If you do not know these details, contact your email provider.

### Procedure

1. Click the **Tools** menu, then click **System**, then click **Options**.

The Options window is displayed.



The screenshot shows the 'Options' dialog box with the 'Email' tab selected. The dialog has several sections:

- Email Address:** A text box labeled 'From' containing 'Reports@FredOffice.com.au'.
- Email Server:** A 'Server' text box containing 'mail.nunet.com.au' and a 'Port' text box containing '25'. Below these are two checked checkboxes: 'Server Requires SSL' and 'Server Requires Authentication'. There are also 'User Name' and 'Password' text boxes.
- Test Email:** A text box labeled 'Email' and a 'Send Test Email' button.
- Restore Defaults:** A 'Restore Default Mail Server Settings' button.

At the bottom of the dialog are 'OK', 'Cancel', and 'Apply' buttons.

2. Click the **Email** tab.
3. Under the **Email Address** heading, in the **From** field, enter the email address that your scheduled reports will be sent from.

This email address does not need to exist; you can enter any validly-formatted email address. For example, the default email address ([reports@fredoffice.com.au](mailto:reports@fredoffice.com.au)) does not exist.

However, using a real email address will allow recipients to reply to your scheduled report emails. Additionally, you may wish to let your recipients know which email address your scheduled reports will be sent from, so that they can prevent them from being marked as spam.

4. In the fields under the **Email Server** heading, enter your email account's server details to enable Fred Office to connect to your email account.

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**Note:** If you do not know all of your email account details, contact your email provider.

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5. Click **Apply**.
6. Send a test email to confirm you have entered the correct **Email Server** details:
  - a. In the **Email** field under the **Test Email** heading, enter the email address to send the test email to.
  - b. Click **Send Test Email**.
  - c. Check your inbox.
    - If the test email arrives, Fred Office is correctly configured to send emails.
    - If the test email does not arrive, check and re-enter your **Email Server** details in Fred Office, then click **Apply**, then try sending another test email.
7. When you have confirmed that your **Email Server** details are correct, click **OK**, to save your changes and close the Options window.

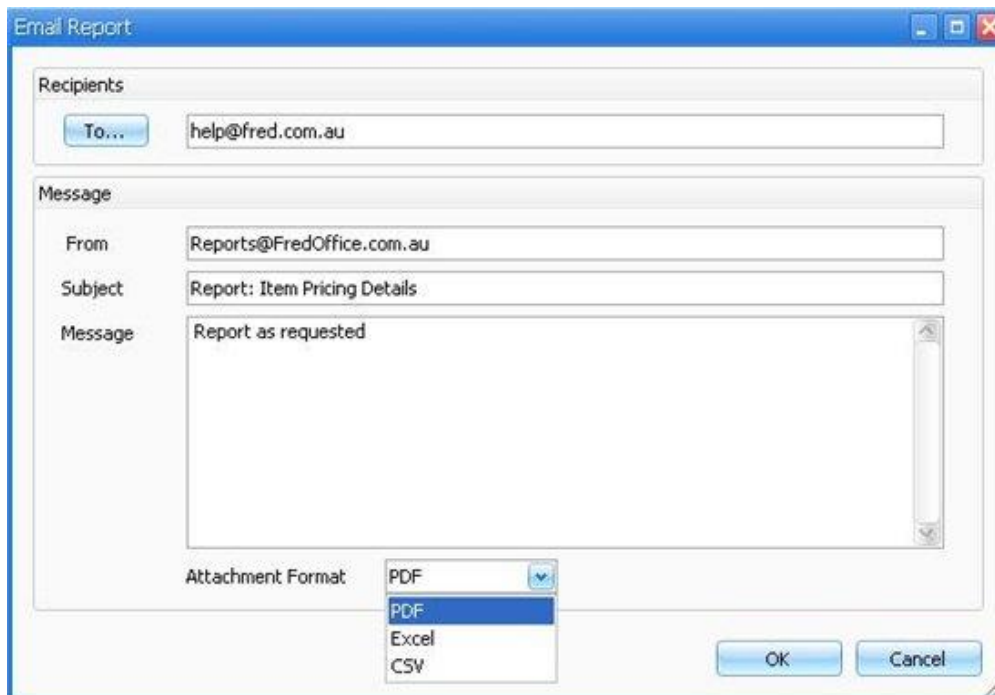
# EMAIL A SINGLE REPORT

When you are viewing a report, you can email it at any time. It will be emailed with the current filters, columns, and style you are using at the time that you send it.

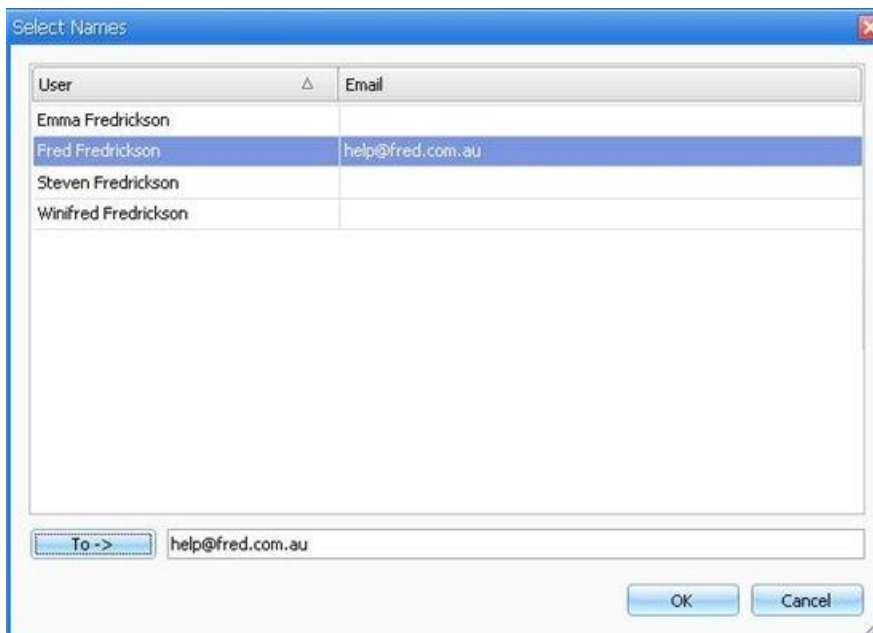
1. Run the report you want to email.
2. Configure the view of the report you want (for example, use the filters to show, hide, or sort data).
3. On the Report screen, click **Email Report**.



The Email Report window is displayed.



- In the **Recipients** field, enter the email addresses the report will be sent to. Alternatively, to select other Fred Office users at your pharmacy, click **To...**



- In the **From** field, if required, you can change the email address to send the email from.
- In the **Subject** field, edit the email subject line, if required.
- In the Message field, edit the email content, if required.
- From the **Attachment Format** drop-down list, select the format to send the report in.

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**Note:** A report in **PDF** format will look similar to what you see in Fred Office, but is difficult to edit.  
Some recipients might require **Excel** or **CSV** format so they can manipulate or extract the report data.

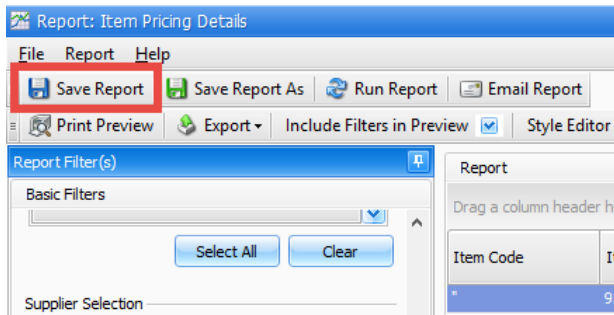
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- To send the email, click **OK**.  
The email is sent, with your report attached.

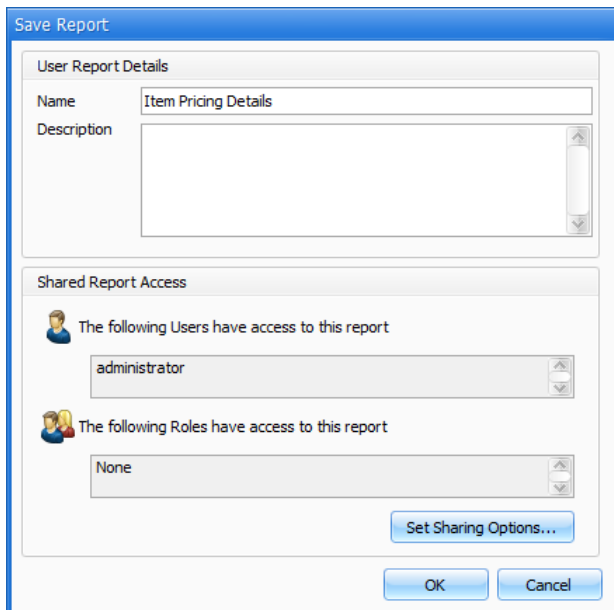


# SAVE A REPORT

1. Run the report you want to email.
2. Configure the view of the report you want (for example, use the filters to show, hide, or sort data).
3. On the Report screen, click **Save Report**.



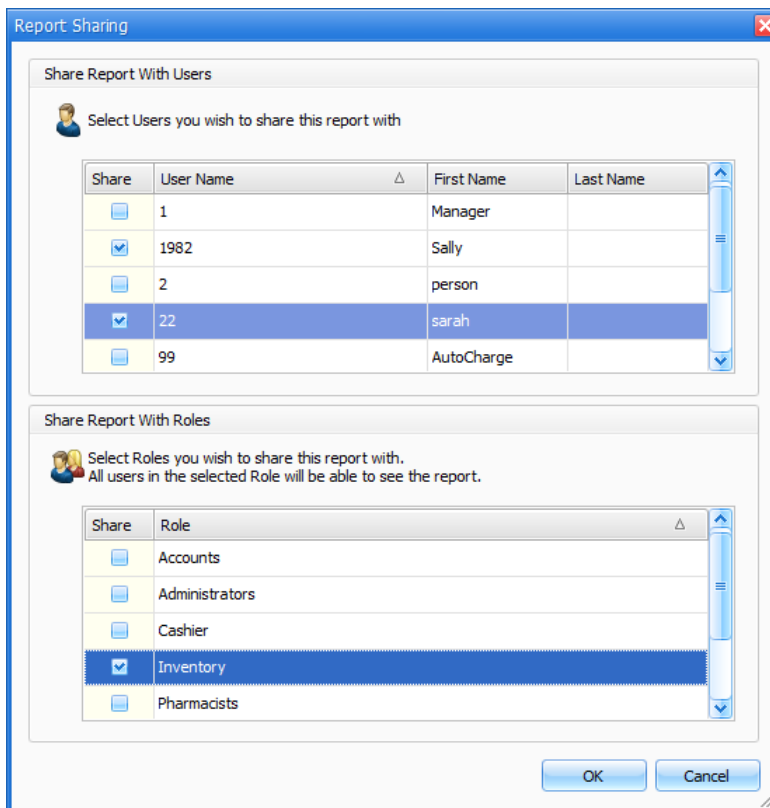
The Save Report window is displayed.



4. Enter the **Name** and **Description**.

5. Click **Set Sharing Options**.

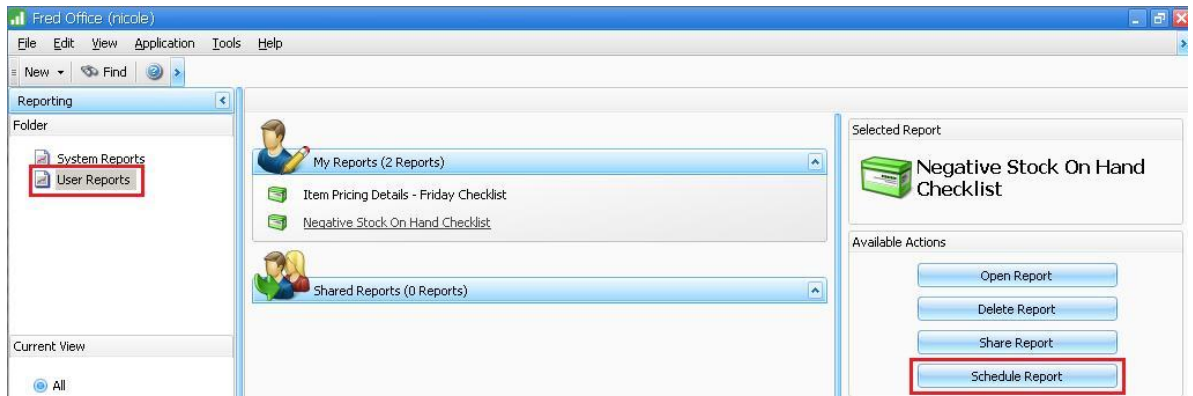
The Report Sharing window is displayed



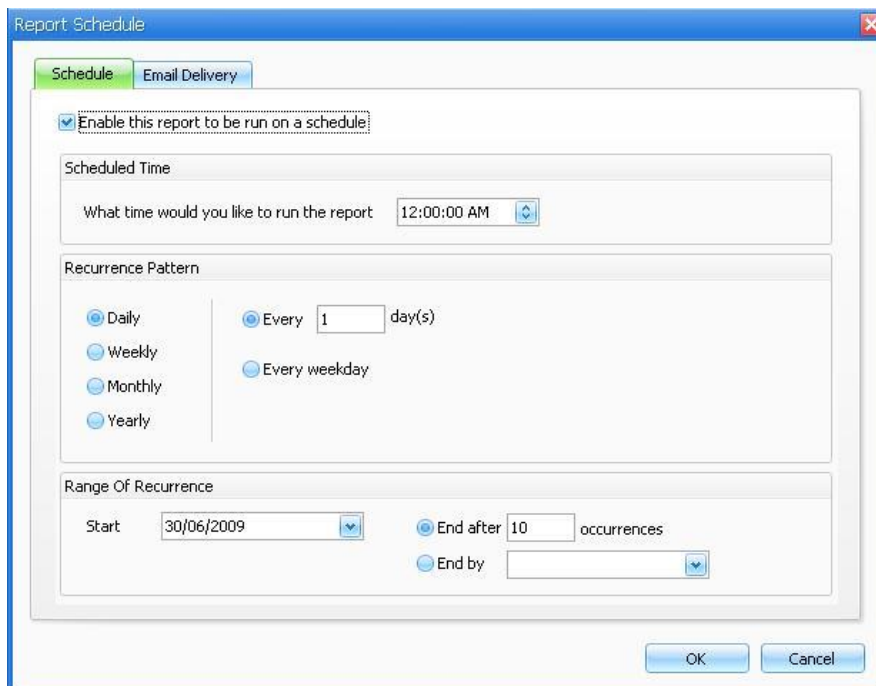
6. Select the **Users** and/or **Roles** you want to be able to view the report.
7. Click **OK**, to save your changes and return to the Save Report window.
8. Click **OK**, to finish saving your report and return to the Report screen.

# SCHEDULE A SAVED REPORT TO BE RUN AND EMAILED AUTOMATICALLY

1. On the **Reporting** menu on the left-hand side of the screen, click **User Reports**.  
The report you saved is now listed under **My Reports**.
2. Click the report you want to schedule, then click **Schedule Report**.



The Report Schedule window is displayed, with the **Schedule** tab active.



3. Tick the **Enable this report to be run on a schedule** checkbox.
4. In the **Scheduled Time** section, select the time of day to run the report.
5. In the **Recurrence Pattern** section, select the frequency with which to run the report.
6. In the **Range of Recurrence** section, select the date to **start** running the report, and either the number of **occurrences** of the report, or the date to **end** the scheduled runs of the report.

7. Click the **Email Delivery** tab.

The screenshot shows the 'Report Schedule' dialog box with the 'Email Delivery' tab selected. The 'Recipients' section has a 'To...' button and an empty text field. The 'Message' section contains the following fields:

- From:** Reports@FredOffice.com.au
- Subject:** Scheduled Report
- Message:** This is an automated scheduled report.

At the bottom, the 'Attachment Format' is set to 'PDF'. 'OK' and 'Cancel' buttons are at the bottom right.

8. In the **Recipients** field, enter the email addresses the report will be sent to. Alternatively, to select other Fred Office users at your pharmacy, click **To...**

The screenshot shows the 'Select Names' dialog box with a table of users. The 'Fred Fredrickson' row is selected, and his email address 'help@fred.com.au' is displayed in the 'To ->' field at the bottom.

User	Email
Emma Fredrickson	
Fred Fredrickson	help@fred.com.au
Steven Fredrickson	
Winifred Fredrickson	

'OK' and 'Cancel' buttons are at the bottom right.

9. In the **From** field, if required, you can change the email address to send the email from.
10. In the **Subject** field, edit the email subject line, if required.
11. In the Message field, edit the email content, if required.

12. From the **Attachment Format** drop-down list, select the format to send the report in.

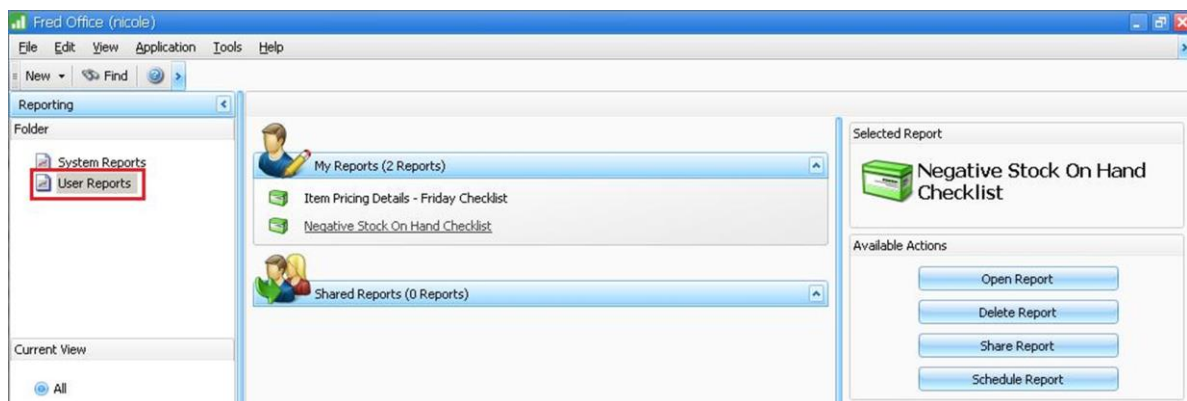
**Note:** A report in **PDF** format will look similar to what you see in Fred Office, but is difficult to edit.  
Some recipients might require **Excel** or **CSV** format so they can manipulate or extract the report data.

13. To save the schedule, click **OK**.

The report will be run and emailed according to the schedule you set.

## EDIT A SCHEDULED REPORT

On the left-hand navigation menu, click **Reporting**, then click **User Reports**. The reports you have saved are displayed under **My Reports**.



### Edit the report settings

1. Click to select the report you want to edit.

2. Click **Open Report**.

The Reporting screen is displayed.

3. Make the required changes, then click **Save**.

### Edit the schedule

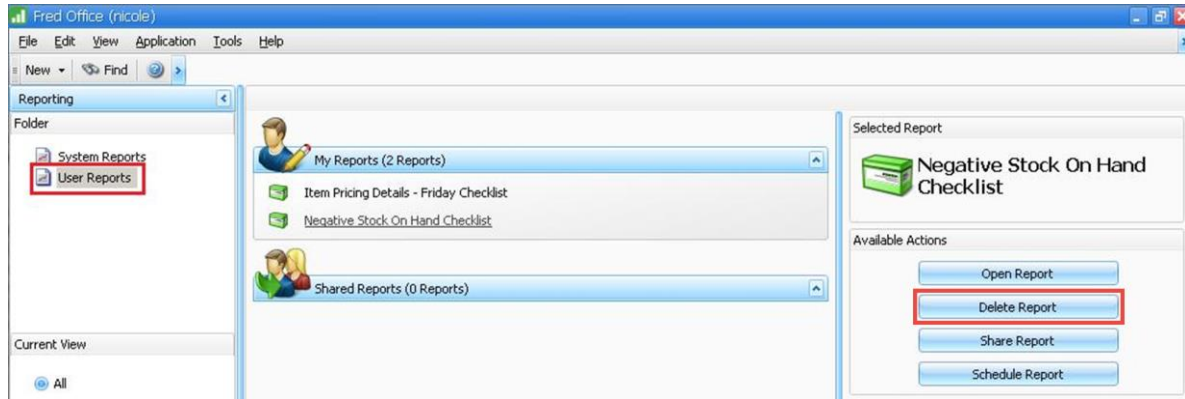
1. Click to select the report whose schedule you want to edit.

2. Click **Schedule Report**.

The Report Schedule window is displayed. For details on using this window, see [Schedule a Saved Report to be Run and Emailed Automatically](#).

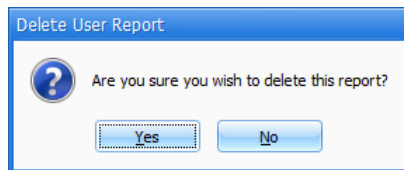
# DELETE A SCHEDULED REPORT

1. On the left-hand navigation menu, click **Reporting**, then click **User Reports**. The reports you have saved are displayed under **My Reports**.



2. Click to select the report you want to delete.
3. Click **Delete Report**.

The Delete User Report prompt is displayed.



4. To delete the report, click **Yes**.

# DEALING WITH REPORTS SCHEDULED BY OTHER USERS

If a Fred Office user stops working at your pharmacy, their scheduled reports might keep running! This can be an annoyance and a security issue.

The most straightforward option is to ask the user to delete their saved reports before they leave. For details, see [Delete a Scheduled Report](#).

If the user leaves without deleting their saved reports, another user with the **Administrator** security role must change the user's password, then log in as that user and delete the reports. For details, see [Log in as another user and delete their scheduled reports](#).

## Should you Deactivate or Delete users?

When a Fred Office user stops working at your pharmacy, you can choose to either *deactivate* or *delete* their Fred Office account. **In both cases, you should ensure that the users's scheduled reports have been deleted *before* the user's account is deactivated or deleted.**

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**Note:** We recommend *deactivating* user accounts, rather than deleting them, in order to preserve the audit history of the user's actions.

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- **If you plan to *deactivate* the user:** Make sure the user's scheduled reports have been deleted ***before*** you deactivate the user; otherwise, the reports will continue to be run and emailed.
- **If you plan to *delete* the user:** You must ensure that the user's scheduled reports have been deleted ***before*** you delete the user – otherwise, the report will still attempt to run, which will crash Fred Office. If this happens, you will need to contact Fred Help to have your database repaired.

# Log in as another user and delete their scheduled reports

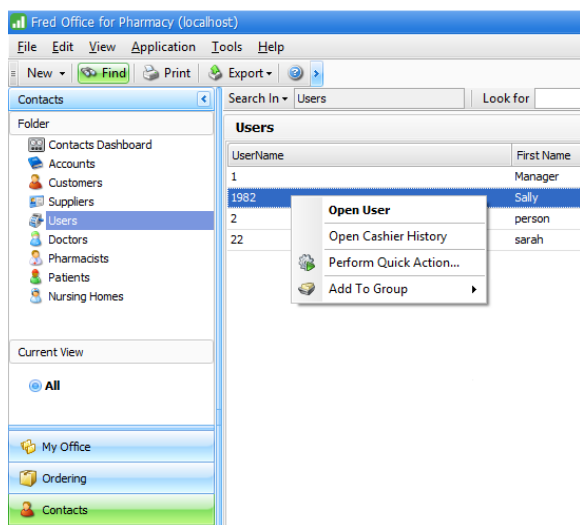
In order to log in as another user, it is likely that you will need to first change the user's password.

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**Note:** You must have the **Administrator** security role to perform this procedure.

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1. On the left-hand navigation menu, click **Contacts**, then click **Users**.  
The Users screen is displayed.
2. Right-click the user whose password you want to change, then click **Open User**.





The User Account window is displayed.

User Account (1982)

User Details Roles and Permissions

Logon Details

User Name 1982

This account is enabled and ready to logon

Change Password Disable Account Reset User Settings

User Details

First Name Sally

Last Name

Phone 0411852654

Email

Remarks

Cashier Details SatScan Details Task Allocation

Enable cashier account for this user account

Cashier Logon

Replicate user account login details

Cashier User Name 1982 (max 9 chars)

Cashier Password \*\*\*\* (max 12 chars)

Cashier Options

OK Cancel Apply

3. Click **Change Password**.

The Reset Password window is displayed.

Reset Password

Enter New Password

New Password

Confirm Password

Save Cancel

4. Enter the new password in the **New Password** field, then re-enter it in the **Confirm Password** field.
5. Click **Save**, to save the new password and return to the User Account window.
6. Click **OK**, to close the User Account window.

You can now log out of Fred Office, log in as the user, and delete their saved reports. For details on deleting their saved reports, see [Delete a Scheduled Report](#).